

V. Building Capacity Through Training and Technical Assistance

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How to Use this Section

In this section you will find guidance to support developing a comprehensive training plan. Each section contains summarized guidance and tools to assist you. If you are in the very beginning stages of training plan development, it is recommended that you review the sections from the beginning. If you are further along, then it is recommended that you review each question and review materials under the one that best supports the stage of development you may be experiencing.

Under most questions you will also find useful “**TOOLS**” to assist you in that particular area of training plan development. Each of these tools will have a link with the title as well as a brief summary of its use. The **TOOLS** section may also include other helpful links, websites or articles.

What is Training and Technical Assistance?

When resources become limited, often training is an area that is cut in budgets. Because of that, an efficient, well thought through plan becomes more critical. Training plans often include a list of formal training topics to deliver to front line employees. However, transfer of learning only occurs with a full array of learning opportunities inclusive of formal overview training, skill building training, supervisory support or coaching, quality improvement feedback, practice and review, ongoing training follow up and technical assistance. A good training plan will be the result of an array of training methods, but will also be inclusive of the system's overall vision, mission, agreements and strategic plans. Isolated training plans often lack system support resulting in a good series of training but an inability to produce new skills among employees.

TOOLS

Principles of Adult Learning: Connecting to Transfer of Learning: This worksheet can assist in thinking through technical assistance or training strategies/methods to delivering material and information.

Why Do We Need Training and Technical Assistance?

Training and ongoing skill development is one of the keys to successful SOC implementation. Assessing what training is already available that supports SOC, what is lacking, who needs to attend what training and how you might sustain delivery of ongoing training is critical to assess early on. Furthermore, identifying and designing technical assistance plans that will support formal training and skill development over time is necessary to ensure the supports are in place for an ever changing work force.

What Goes Into a Training Plan and How Do We Develop a Good One?

Training plans often include a list of formal training topics to deliver to front line employees. However, transfer of learning only occurs with a full array of learning opportunities inclusive of formal overview training, skill building training, supervisory support or coaching, quality improvement feedback, practice and review, ongoing training follow up and technical assistance. A good training plan will be the result of an array of training methods, but will also be inclusive of the system's overall vision, mission, agreements and strategic plans.

Types of training and support:

Overviews: These trainings provide an overview of the topic but do not provide details for skill building. They are specifically to raise awareness of the issue or topic.

Skill Building: These training topics teach process and specific skills that can be used to implement new practice or tasks. These trainings usually provide tools and guidance for ongoing implementation of the new practice or task.

Practice Development: These sessions are designed to provide intense individual or small group practice of the new skill or task. They can be tailored to a community's needs and can be delivered in numerous ways.

Supervisory Support/Coaching: This is specific training and coaching for supervisors and is tailored to supervisors and teaching them how to continue and promote learning of new skills among their employees. Another key to transfer of learning is to build in sustainable ways to continue the employee's skill building support. Supervisors have the greatest opportunity to impact ongoing learning through supervisory meetings, coaching of new practice, teaching new information and conveying expectations of the system.

Technical Assistance: This is an optional way to provide ongoing coaching, support or assistance in implementation of new plans, practice or tasks. Individuals are contracted to assist a site in the work they do locally. Technical assistance is provided on site.

Train the Trainer (TOT): These trainings teach others to train a specific topic or teach trainer skills in order for communities to build their own training sustainability plan.

The elements of a comprehensive training plan should include the following:

1. Assessment of training priorities and needs
2. Recruitment of committee members to oversee training plan development and implementation that include diverse membership – parents, different agency representatives, etc.– (leadership of this committee must understand the vision and steps to reach the vision)
3. Targets outcomes/indicators and how the committee will know they have reached those outcomes
4. Creates a plan for implementation of the priorities inclusive of formal training, practice development, technical assistance, and supervisory coaching
5. Specifies how plan connects to quality of care/system of care framework, agency vision, strategic plan and quality improvement processes within the system
6. Targets and recruits participants for training, including of parents and /family members
7. Provides training, evaluate, incorporate learning and continue implementation
8. Creates a sustainability plan

TOOLS

Comprehensive Training Plan Checklist: This checklist can be used to guide the plan development process as well as check a completed plan.

System of Care Training and Technical Assistance Plan: This grid can help a committee or group to capture priority training topics, target participants, assess needs and resources and set timelines.

Training Plan Process: This document outlines the steps to development of a Training Plan. It includes explanations of each plan development step.

Training and Technical Assistance Plan Format: This template can be useful in creating a training and technical assistance plan. It provides key areas to cover in order to assess whether your program needs technical assistance in the initial phases of plan development and implementation.

How Do We Determine Our Training Priorities and Assess Our Community's Needs?

A good assessment is key to the development of a good training plan. Formal assessments, surveys, telephone conversations, and data all can be used to determine priorities. The following tools or information may already be accessible to you, so investigate what information your system already has in place before creating a new tool or set of questions. Search for recent:

- Community assessments
- Outcomes information
- Family satisfaction and surveys
- Provider feedback

TOOLS

Training Assessment Survey: This is an example of a survey that can assist with the assessment of skill level of providers. This survey can easily be adapted to meet your specific community needs.

System of Care Training and Technical Assistance Plan Assessment: Together with members of your single or multi-county Child Community Collaborative, this grid may be used to identify and check training and technical assistance needs of your community by target audience. Completion of this form can inform the development of a training and technical assistance plan.

Wraparound Organizational Assessment (Lead Agency) - Portland State University

This tool assesses the organizational support for wraparound teams (*equivalent of Child and Family Teams*) from a team member perspective.

Wraparound Organizational Assessment (Agency Partners) - Portland State University

This tool assesses the organizational support for Individualized Service/Support Planning (ISP), *which is the equivalent of a Child and Family Team (CFT)*, from the perspective of team members.

Wraparound System Assessment – Portland State University

The purpose of this checklist is to provide a structured way to assess the policy and funding context that surrounds wraparound teams and the lead agency that houses these teams.

How Do We Go About Setting Up a Training Committee?

A Training Committee should be formed in a calculated way. Member recruitment should include a diverse group, preferably made up of people who understand training/skills and have delivered training. This is not always possible so recruiting people that understand the topics that fall within your community's training priorities.

The chair of this committee needs to have an understanding of the bigger picture, including current strategic plans, Collaborative plans and access to data and quality improvement activities, in order to ensure that training activities support or are supported by the greater goals of the system.

When recruiting members consider the following:

- Do you have a local AHEC with trainers that may be interested in participating?
- Do local public, non-profit and family organizations have trainers on staff?
- What employees or family members are interested in pursuing training as a career or professional development?
- Are there Service Providers in the community network interested in pursuing their own training and/or collaborative training efforts?
- Who will it take to represent the population and cultural make up of your community and those you serve?
- Who already has some training as part of his/her job description?
- Who has expertise in the priority training areas?
- Who is available to consistently participate on the committee?

When recruiting members, it is also important to let them know in advance that the expectation includes recruitment of training participants and sharing information back to their full agency or community.

Furthermore, create your committee vision, purpose and tasks in advance of recruitment of members so that they know fully what they are committing to.

How Do We Get Parent sand Family Members Prepared as Trainers?

Feedback from participant's who have attended System of Care training topics presented by parent/agency teams noted the difference it made to have family members in the room. When family members are in the training room, the discussions change, the impact of the training is more significant and the emphasis on the importance of working with the family from their perspective is greater. The only way to truly reach this outcome is to create environments and develop expertise where family members are the trainers. No one but a family member can fully speak or teach from that perspective.

It should not be assumed that parents and family members are not already trainers. Often they become quite skilled through their own advocacy role they develop on behalf of their child or family member. However, we often ask a lot of parents and family members without proper preparation.

There are several steps to consider before inviting families to the training committee:

- Ask if he or she is interested in training regardless of their current skill or experience. The first questions should relate to interest and knowledge of a topic or experience. Training skills can often be taught, but experience and family perspective cannot.
- Next ask what time the person can devote to preparing to train. Often we ask a lot of family members without asking what their availability really is.
- Prepare families for what the time commitment, based on the potential planning process, of what you think the time may take.
- Include family members in every training committee and planning meeting from the very beginning.
- Offer training skill supports either through training teams with experienced trainers partnering with less experienced trainers; or offer training skills courses.
- Always allow for proper preparation before training, especially the first time.
- Make an effort to match up training teams that are comfortable together and prepare teams reflective of agency and family members.

Family members have a lot to share and say that can inform our system and increase our workforce competencies. Therefore, creating pools of trainers inclusive of family members becomes a necessity, not a luxury. Furthermore, family members are the best resource for providing support to other families and assisting other communities to prepare parents to take the lead on training and technical assistance. It all comes down to “reach one, teach one”, as long as we do so with the right teacher!

In the last portion of this section it discusses sustaining training programs in the community. This same approach and information applies to sustaining family members as trainers.

How Do We Measure Our Training and Technical Assistance Success?

Based on the training needs/priorities assessment and the strategic planning priorities, outcomes and training goals must be set. This should include a vision of what the outcome will be and what practice will look like when training plans have been fully implemented. This should be measurable and clear to all committee members and everyone should be able to know when you have gotten there. For example, if you implement training for Person Centered Planning, an outcome may be that all CSS providers practice consistent planning methods for the PCP process. Next, the committee must define how they will know when the practice has changed and is meeting the identified outcome. This is done in several ways: training evaluation, satisfaction surveys, data collection, and quality improvement activities.

- **Training Evaluations:** Every training should be evaluated by the participants. Collection of a training evaluation is good, but the development of a useful evaluation is better! Be sure that your evaluation forms ask questions not only about reaching

objectives, rating facilitators, best and least useful portion of training, but questions that will provide feedback for that particular training and other training needs. Asking a question such as “What skill area was not covered in this training that you need help with?” can inform adjustments to or creation of new curricula. Also, the needs assessment process is ongoing and a question that asks about other needed topics for future training will inform the training committee’s work. Basically, think carefully about what you need from participants, while you have them there, to continue to inform your training development work.

- **Satisfaction Surveys:** Family and consumer satisfaction surveys often inform training priorities as well. Families and consumers not only give feedback on access to or satisfaction with services, but they also can inform you of how they were treated, how well they were engaged in treatment or planning, etc. This information can be invaluable when training and coaching employees.
- **Data collection:** Data can show if service delivery is more available, if clinical outcomes are improving or if consumers are in service for shorter lengths of stay. Data can also show what service gaps or practice gaps exist in the system informing potential future training priorities.
- **Quality improvement activities:** Keep in mind that training plans will teach new tasks and skills, so the quality improvement activities should also reflect new ways to ensure practice is changing. The training activities should not be forced into the existing quality improvement activities, but developed in a collaborative manner to reflect exactly what is needed to support reaching training outcomes. For example, one way to know if Person Centered Planning is properly occurring is to sit in a meeting and watch the process for evidence of certain practices. So a quality improvement outcome indicator may be to include PCP meeting observations as a measurement of new practice outcomes.

TOOLS

Child and Family Team File Form: This form can be used to review consumer records for evidence of SOC and Child and Family Team practice. This form can be modified to meet your local needs.

Child and Family Team File Form Code Book: This document goes with the CFT File Form. It provides guidance and rating scales for consistent review of consumer records.

Child and Family Team Observation Form: This form can be used to review for evidence of SOC and Child and Family Team practice as an observer of the actual meeting. This form can be modified to meet your local needs.

Child and Family Team Observation Form Code Book: This document goes with the CFT Observation Form. It provides guidance and rating scales for consistent CFT observation feedback.

Family Driven – Youth Directed Services Checklist: This tool can be used to evaluate systems for family driven – youth directed care. Providers and families should use this document as a learning tool and make revisions to fit the needs of the child and family.

Mechanism for Utilization of Data in Collaboratives: This chart is one example of how data related activities could be communicated to inform the Collaborative and Committees.

How Can We Sustain Our Training and Technical Assistance Plan?

Training plans are often expensive to implement initially and when budgets get tight, training is often the first to go. However, planning a way to sustain training early on will support the plan implementation on an ongoing basis. In order to sustain training the following questions must be asked and answered:

- What is our capacity to create a local pool of trainers?
- What are our current local training resources?
- How can we prepare a training pool if it does not already exist?
- What does it take to support the time commitment to develop, prepare and deliver quality training on an ongoing basis?
- What topics are critical to orientation and ongoing required training across the system that we can deliver ourselves?
- How do we fund our own ongoing training plan implementation delivery?

Once these questions are answered it will inform the direction your local community goes. Possible solutions to sustaining training may include the following options.

Coordination of local resources: This effort will require a committee and coordination of all trainers in the community that are willing and interested in pooling their resources and talents. Select topics, both required and other, can be targeted and delivery of the topics can be planned throughout each fiscal year.

However, when coordinating this type of effort, do not expect that trainers commit to only this group. Often there will be overlap among trainers, but not complete overlap. Allow time to plan and coordinate properly so that trainers do not get frustrated.

Train the Trainer: This effort can be approached through two avenues: 1) Train the Trainer skills so that people with expertise gain training delivery skills; and/or 2) Train the Trainer on specific content so that already existing trainers are able to deliver training on specific topics needed in the community.

Non-UCR dollars and other funding: Another crucial part of sustaining training is to secure funding for the plan. Non-UCR dollars can possibly support training costs as determined and agreed upon by the local Collaborative and LME. Sometimes funding can be pooled by multiple agencies to support training costs.

TOOLS

Trainer Capacity Assessment: This document includes a series of questions to ask when assessing of trainer capacity. Usually this will be completed by each agency and organization involved in the training plan development and implementation. Responses to these questions can inform next steps needed to create sustainable training in the community. Depending on the responses to the questions, it may be necessary to begin the sustainability process with train the trainer courses or you may have find you have the capacity to take on training content with experienced trainers fairly quickly.

Helpful Links And Articles

Websites:

ONE learning Connection (Online SOC curriculum):

ONE Learning Connection is an interactive online training tool designed to provide information about Best Practice in Mental Health Service Provision. Training sessions are designed to provide information and practice opportunities to anyone involved with assisting a family having a child with SED. The foundation of this program is SOC and is an alternative training tool that is easy to use by those with access to a computer.

Link: www.systemofcare.net

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<http://learnweb.harvard.edu/alps/thinking/docs/traencyn.htm>: ***Transfer of Learning;*** This article explains the different levels of learning transferred to practice.

Articles:

A Guide to Co-training by James A. McCaffrey and Wilma J. Gormley. This article is helpful in preparing for training with a co-trainer. It helps trainers identify expectations of training and each other, identify comfort areas and challenging areas as well as provides guidance to prepare delivery of the training content together.